

Historion® Upgrade Testing Checklist

I have upgraded Historion. What should I do for acceptance testing, to confirm that all is in order?

There is a minimum of 14 items to test to ensure core features and interfaces in use operate as intended. The checks listed are targeted for technical coverage and are required in optimal operation of Historion. It is recommended at least one Administrator and one Non-Administrator User execute these test steps.

Upgrade Testing Checklist		
Test	Feature or Interface	✓
1.	Confirm Historion starts from C:\ drive from a mapped network drive and from a \\UNC path	
2.	Under <i>About</i> in the <i>Help</i> tab - Confirm the Historion Code version indicated is correct - Confirm the Database Update number indicated is correct	
3.	Confirm in the Admin/Users list Users Last Logged in Dates are reflecting latest login events	
4.	Confirm that Dose Reports import into Historion successfully; manually import a test external Dose Report CSV file. Test files are available from Historion Support, on request	
5.	Confirm that a manually imported Dose Report can be exported back out of the Historion database, using the [Original] Dose Report export feature in the Dose Report Details screen	
6.	If a Landauer customer, confirm the Landauer Online Data Transfer utility downloads any Dose Reports available and subsequently successfully imports Readings in Historion	
7.	Confirm that Historion Wearer Reports (11, 34, 35 and 36 specifically) display and export	
8.	Confirm in the Reports tab, the <i>Inspect</i> (Excel) Tool exports combined Dose Reports to Excel	
9.	Confirm that the Refresh Graphs icon at the far right end of the Dosimetry ribbon tab works	
10.	Admin tab; confirm the Run Script <i>Re-set Cross Referenced Data</i> option runs without error	
11.	Wearer Details screen; confirm Exit Letters and detailed Exposure Reports generate in Word	
12.	If SMTP emailing is setup then under Admin/Settings/SMTP Email Send a test Email message	
13.	Confirm under Tools, National Register tabs the ANRDR Readiness check runs, if registered	
14.	Create and then remove a small test custom designed report under Reports/Custom. 8 steps	

Explanation of Historion Testing steps and why they are important

1. Confirm Historion starts from C:\ drive from a mapped network drive and from a \\ UNC path



This test is important to confirm that the main Historion.exe file is not inhibited by antivirus utilities or local network folder, file or Active Directory domain permissions. Historion is deployed as a single executable file compiled with a third-party utility, XBundler. This removes the requirement for a setup kit. Supporting files are unpacked into memory, as they are used. Some domain security and antivirus scenarios inhibit this behaviour.

The test is straightforward, the exe file must start up; the Splash Screen, Ribbon, Main Menu and Home tab.

2. Under *About* in the *Help* tab - Confirm the Historion Code version indicated is **6.1.5.6**
- Confirm the Database Update number indicated is **6.1.3.3**



Each Historion update has a progressively increasing Historion Code version. Less frequently the database will be updated when new structural changes are needed. For testing, the Code and Database Update versions must match the indicated release numbers shown above. Do not proceed further with testing if these versions are not correct and contact your local IT or Historion Support for assistance.

If the Database Updates value is indicated, then the User is successfully *read* accessing the Historion database.

3. Confirm in the Admin/Users list Users Last Logged in Dates are reflecting latest login events



As each Historion User logs in the fact of the login is recorded as a Date and Time stamp for the event against the Users details in Historion. This requires write access to the Historion database even for read-only User Roles. Non-administrator users should not be able to access the Users admin list if default Historion roles are in place.

If Last Logged in dates are indicated correctly then users are successfully *write* accessing the Historion database.

4. Confirm that Dose Reports import into Historion successfully; manually import a test external Dose Report CSV file. Test files are available from Historion Support, on request



Importing an external Dose Report file into Historion tests multiple important functions within the software across multiple internal architectural layers.

A successful Dose Report import is a strong indication of correctly configured SQL database permissions.

5. Confirm that a manually imported Dose Report can be exported back out of the Historion database, using the [Original] Dose Report export feature in the Dose Report Detail screen



Exporting an imported Dose Report back out of Historion (confirming it was correctly stored to begin with) tests multiple important functions related to database storage including binary (“blob”) objects and images.

A successful export, back out, of an imported Dose Report is a strong indication of correctly configured SQL database options, including some choices the IT Department made, as described in the Implementation Guide.

6. If a Landauer customer, confirm the Landauer Online Data Transfer utility downloads any Dose Reports available and subsequently successfully imports Readings in Historion



Importing an external Dose Report file into Historion via the Landauer Data Transfer Utility tests multiple important functions within the software across multiple internal and external architectural layers. Over time the supporting network environment Historion operates within (proxy servers and the application of other network and domain security profiles) can change. This test crosses multiple network security layers.

A successful Dose Report download, and import indicates multiple correctly configured network areas.

7. Confirm that Historion Wearer Reports (11, 34, 35 and 36 specifically) display and export



Historion has integrated into it a third-party reporting suite, Active Reports. There are 14 supporting files (dlls) for ActiveReports packed into the Historion.exe files. These files comprise 85% of the 40 MB Historion.exe file. The Historion Wearer Dose History reports are the most used, most complex and customised. Report 35, especially, tests multiple core statistical procedures used across most Historion reports. Note: it is recommended that the export to Excel and export to pdf (from the Report Viewer) features also be tested in this check.

Successful execution, Excel and pdf export of reports (11,34, 35 and 36) confirms Active Reports interfacing.

8. Confirm in the Reports tab, the *Inspect* (Excel) Tool exports combined Dose Reports to Excel



The Inspect Tool is an Excel Analysis utility located in the Reports tab. It is a powerful and flexible utility for interrogating Dose Readings data. In this test it is recommended that multiple CSV Dose Reports (of same type) be selected and exported to Excel. Depending on configuration options non-admin users may not be able to see the Excel Analysis option.

Successful export to Excel and accurate reconstruction of Dose Reports confirms Historion-Excel interfacing.

9. Confirm that the Refresh Graphs icon at the far right end of the Dosimetry ribbon tab works



If another User imports, or deletes, bulk Dose Readings on a different workstation, the graphs on the Home tab can momentarily become out of date, as their display is static for performance reasons. The graph refresh button is a convenience feature, the User can refresh displayed graphs without exiting the software.

The graph refresh option runs an important suite of statistical tasks normally only executed within Dose Report data import routines. This check clears all statistical tables and then runs the statistical routines in isolation, allowing any data issues to be detected at a lower lever and outside of the larger, integrated import task set.

Successful execution of the graph refresh option confirms all statistical routines and is extremely useful for troubleshooting graph interfaces and data anomalies.

10. Admin tab; confirm the Run Script *Re-set Cross Referenced Data* option runs without error



The Historion database includes multiple short cut tables used to speed up navigation and reporting by getting lookup results and pre-emptively limiting cross-table joins and lookups. Some operation events, such as closing out of the software awkwardly, can lead to these speed-enhancing (cross reference) tables becoming out of date. This issue is automatically resolved by the software itself as data is changed and updated. Non-admin users should not be able to access the Run Scripts option if default Historion Roles are in place.

The script option provided to re-set all Cross-Referenced data runs all these reset tasks in one place and confirms most (over 80%) of the Historion data schema is in place and no fields or tables have been removed or renamed.

Execution of this script, without error, is a strong indication the Historion data schema is healthy and up to date.

11. Wearer Details screen; confirm Exit Letters and detailed Exposure Reports generate in Word



Historion is shipped with two Microsoft Word document templates; the default Exit Letter and the Detailed Radiation exposure report. The Detailed Radiation Exposure Report Word template is a very good test to run because it uses (deliberately showcases) all the available template specific fields, totals and lookup items.

Successful population of the Microsoft Word templates confirms Historion-Word interfacing and automation.

12. If SMTP emailing is setup then under Admin/Settings/SMTP Email Send a test Email message



Historion provides an optional feature for emailing detected Custom Notification rule hits on data import. The Custom Notification details screen and the SMTP Email settings screen in Settings under the Admin tab provide for testing the SMTP feature. SMTP settings must be configured correctly for this to work. Contact your local IT support for assistance if this feature is not yet setup or not working. Non-admin users should not see settings.

Take care when testing SMTP emails and avoid sending test messages to recipients outside of your domain as this can result in internet message transfer agents registering your sending email or IP address on a spam blacklist creating future problems with external email.

If SMTP test messages (only send these internally) are received the SMTP interface and server are working.

13. Confirm under Tools, National Register tabs the ANRDR Readiness check runs, if registered



Historion customers registered with the Australian National Dose Register (ANRDR) are encouraged to run data readiness checks for the current or historical quarters. The readiness checks confirm ANRDR specific elements.

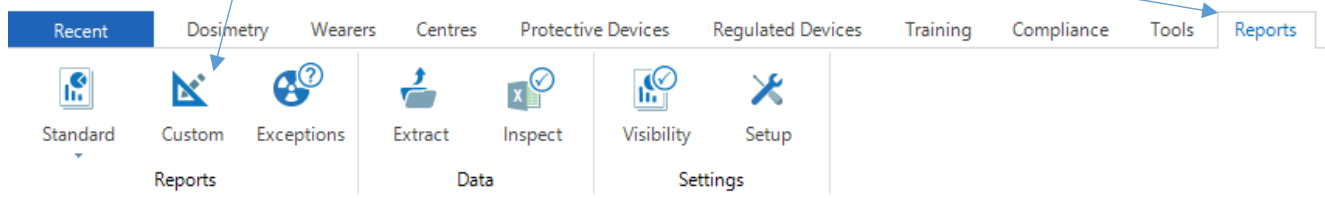
Historion must successfully log required data via the ANRDR Readiness checking utility for ANRDR submissions.

14. Create and then remove a small test custom designed report under Reports/Custom, 8 steps ✓

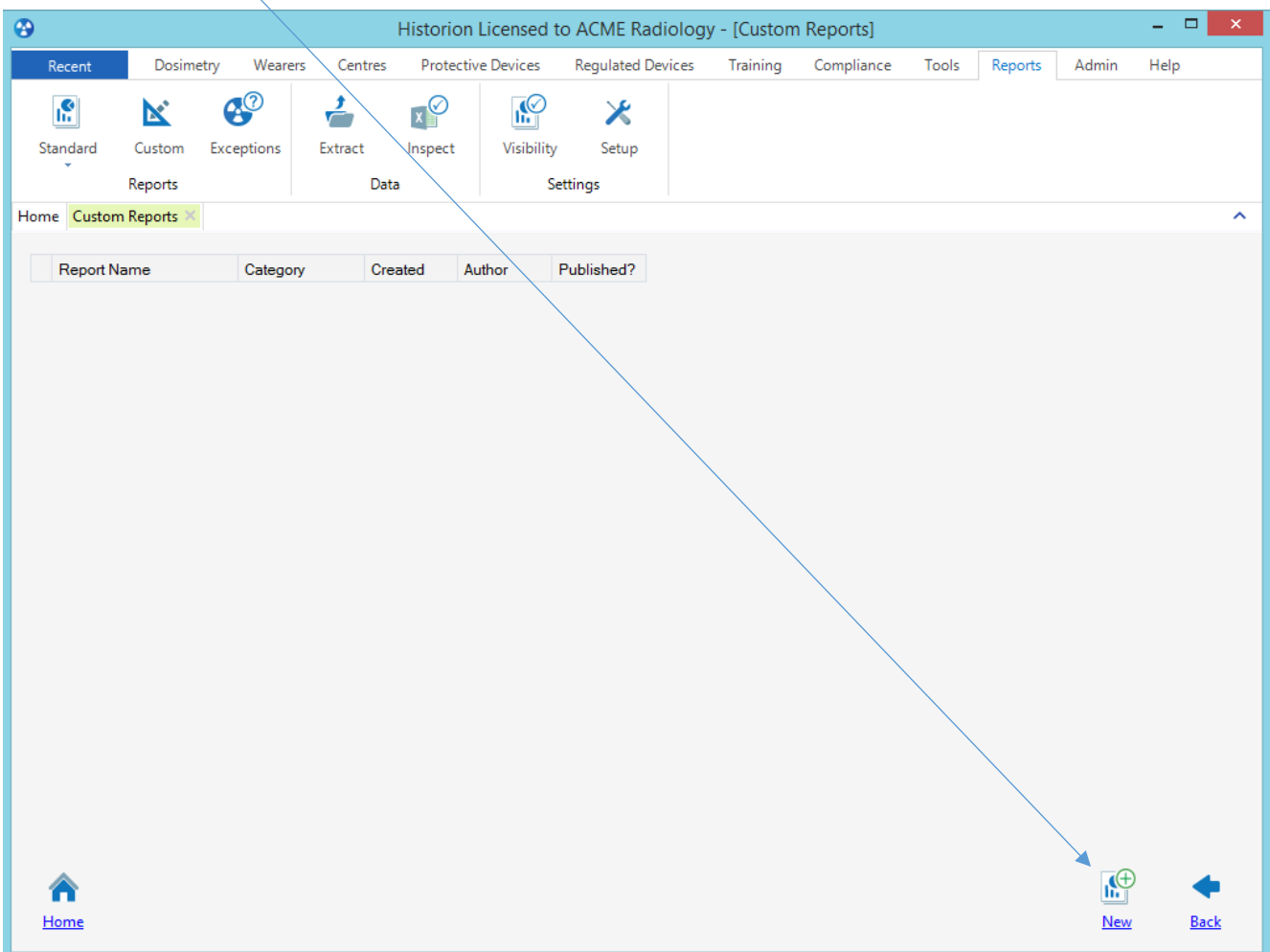
The final test of a Historion implementation is to confirm that a custom report can be created, some design elements added and then the report saved and subsequently removed by the author. Historion has integrated into it a third-party reporting suite, Active Reports. The 8 parts of this test confirm all Active Reports interface elements are functioning correctly.

This is a complex but important test. Steps involved are documented here for clarity:

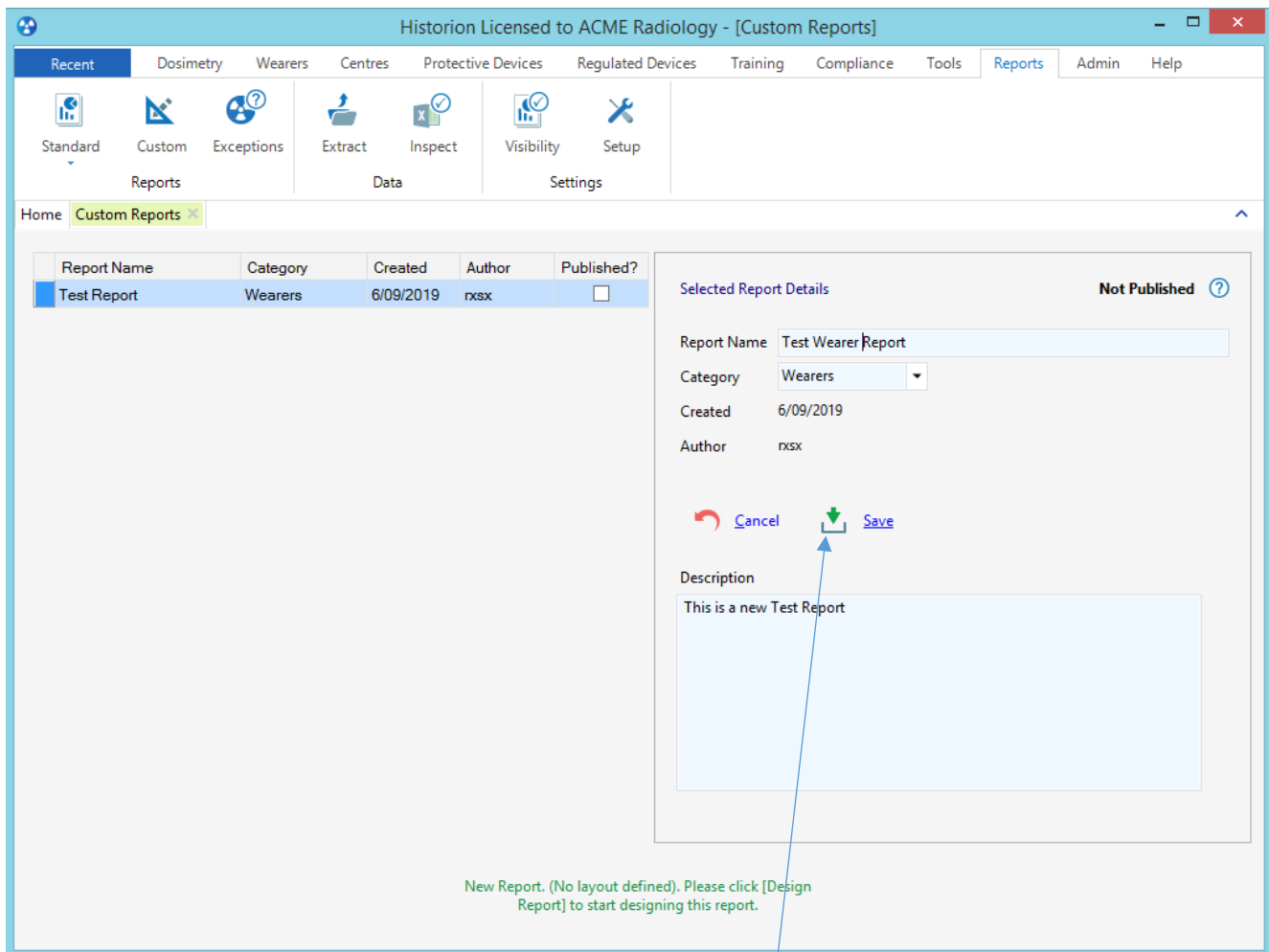
1. Select the **Reports** tab
2. Select the **Custom** icon



3. Select the **New** button



4. Complete the new report fields displayed including selecting the Wearers report category then Save:



Enter basic custom report details as indicated above then select **Save**.

After selecting **Save** the **Design Report** icon is displayed.

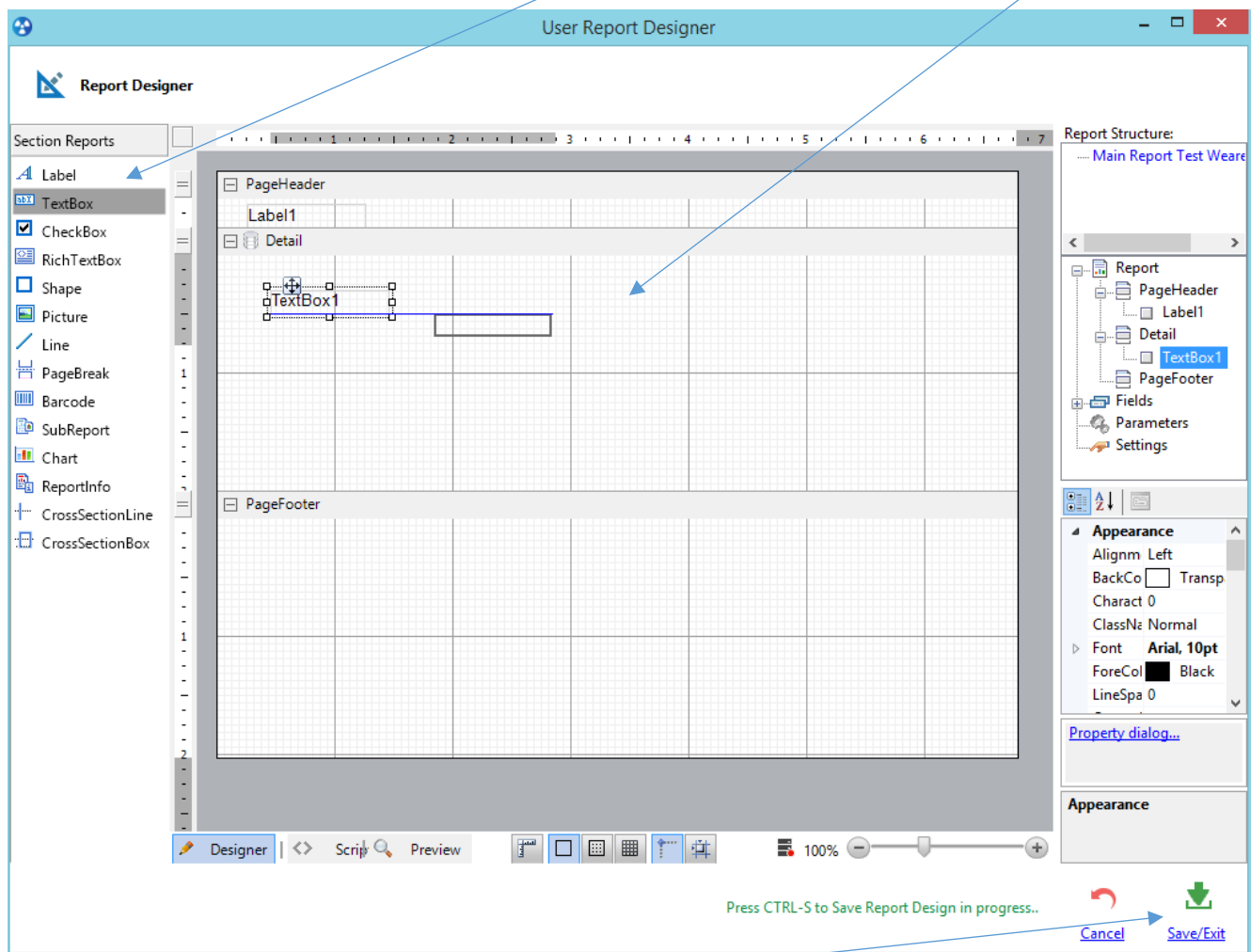
Select **Design Report** to commence basic report design test as indicated below.



The Report Design interface and tools are shown;

Custom Report Design

5. Drag and drop label, textbox or other items from the **object palette** (left) to the **report design surface**;

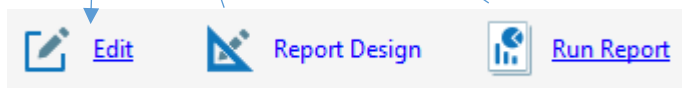


6. Select **Save/Exit**
7. After selecting Save/Exit the screen will return to the custom reports list with the new report selected. Make sure each of the options shown below work.

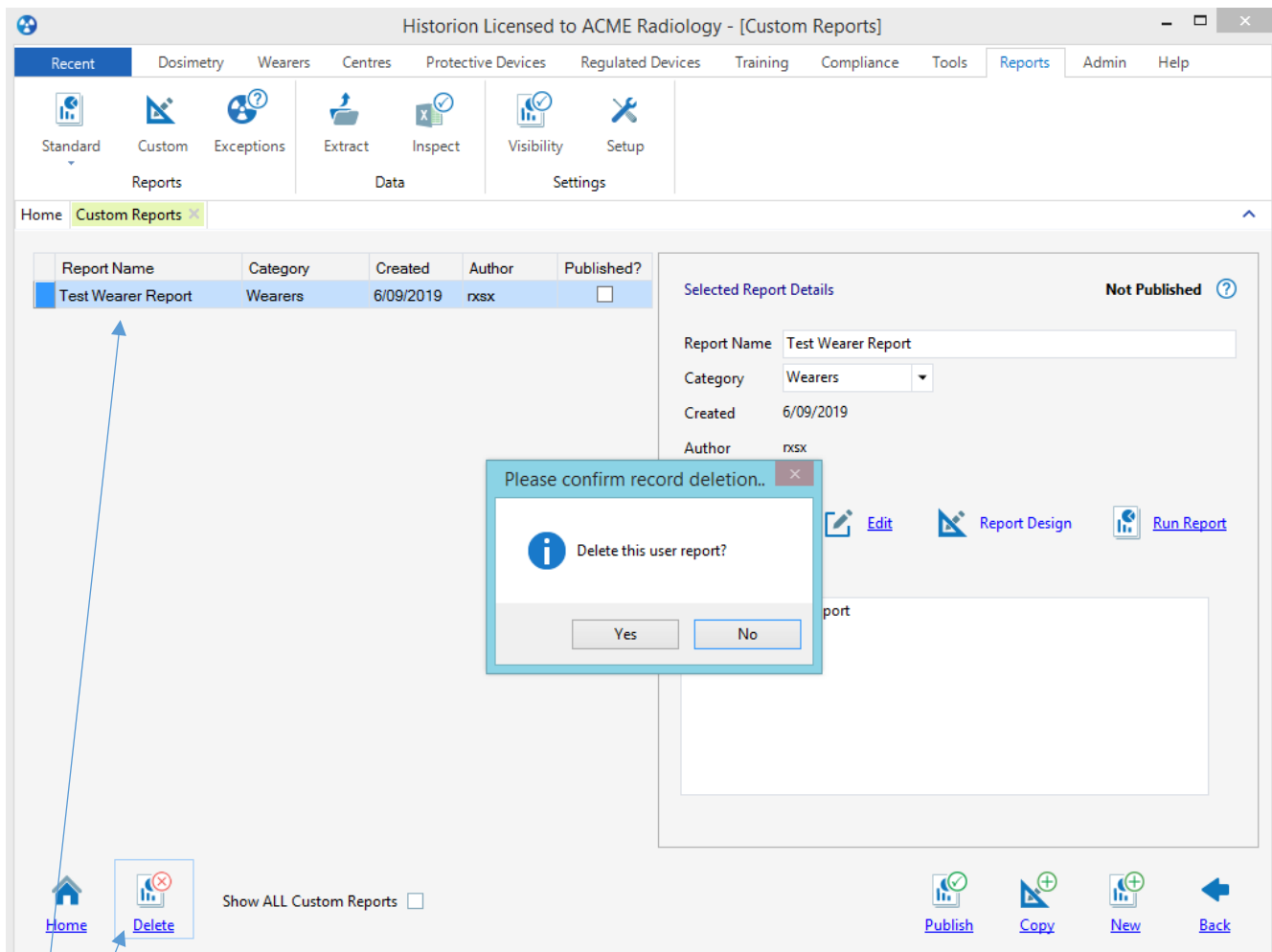
Select **Edit** to change report description etc.

Select **Report Design** to go back into and change the layout and selected objects.

Select **Run Report** to confirm the report displays in the report viewer screen. The report doesn't have to display data or be a particularly well-designed report, it is going to be deleted in the next test.



- Delete the new custom report by selecting the report in the list (if there are other custom reports present be sure to select the new test report only!) then select the Delete button lower left of screen;



Select the custom report to delete.

Delete the custom report (click Yes when prompted).

The ability to add and design re-open and then delete custom reports is a strong indication that the powerful Active Reports designer suite is working.